

**TOWN OF AMHERST**

# HOUSING TRUST STRATEGIC PLAN FY18-22

**FUNDING PROVIDED BY THE AMHERST  
AFFORDABLE HOUSING TRUST FUND AND  
THE COMMUNITY PRESERVATION FUND**

---

**Prepared for**

Town of Amherst  
Amherst Affordable Housing Trust  
4 Boltwood Avenue  
Amherst, MA 01002

---

**Prepared by**

JM Goldson community preservation + planning

---

**J M Goldson**

community preservation  
+ planning

# TABLE OF CONTENTS

<b>ACKNOWLEDGEMENTS</b>	<b>3</b>
<b>EXECUTIVE SUMMARY</b>	<b>4</b>
PURPOSE AND BACKGROUND	4
PLANNING PROCESS	4
FIVE-YEAR GOALS	4
PRIORITY INITIATIVES	4
<b>REPORT ORGANIZATION</b>	<b>5</b>
<b>CHAPTER 1</b>	<b>6</b>
<b>INTRODUCTION</b>	<b>6</b>
STRATEGIC PLAN PURPOSE	6
AMHERST AFFORDABLE HOUSING TRUST	6
LOCAL HOUSING NEEDS AND OBJECTIVES	7
ELIGIBLE USES OF TRUST FUNDS & LEGAL CONSIDERATIONS	9
COMMUNITY PRESERVATION ACT AND THE TRUST	10
FRAMEWORK FOR TRUST OPERATING APPROACH	11
<b>CHAPTER 2</b>	<b>12</b>
<b>GOALS &amp; STRATEGIES</b>	<b>12</b>
MISSION	12
FIVE-YEAR GOALS	12
OPERATING APPROACH & RELATIONSHIP WITH CPA FUNDS	13
PRIORITY INITIATIVES	14
OPERATING STRATEGIES	20
FIVE-YEAR BUDGET	22
<b>APPENDIX 1</b>	<b>23</b>
<b>AMHERST AFFORDABLE HOUSING TRUST BYLAW, AS MODIFIED MAY 2017</b>	<b>23</b>
<b>APPENDIX 2</b>	<b>26</b>
<b>SUMMARY OF STRATEGIC PLANNING WORK SESSION</b>	<b>26</b>
SUMMARY	26
1) SMALL GROUP DISCUSSION EXERCISE PART 1	27
2) PARTNER DISCUSSION EXERCISE PART 2	28
3) PRIORITIZATION EXERCISE	29

---

# ACKNOWLEDGEMENTS

With support from the Amherst Planning and Zoning Department, the Amherst Affordable Housing Trust Board of Trustees led the production of the Amherst Housing Trust Strategic Plan.

## AMHERST PLANNING AND ZONING DEPARTMENT

Christine Brestrup, Planning Director

Nathaniel Malloy, Senior Planner

## AMHERST AFFORDABLE HOUSING TRUST

John Horik, chair

Nancy Gregg

Thomas Kegelman

Doug Slaughter, Board of Selectmen member

Greg Stutsman

### **With the assistance of planning consultant:**

Jennifer M. Goldson, AICP, Founder, JM Goldson community preservation + planning

### **The Board of Trustees, Planning and Zoning Department, and consultants gratefully acknowledge the following individuals for their contributions to this study:**

Connie Kruger, Select Board member and former Affordable Housing Trust member

Jan Dizard, former Affordable Housing Trust members

#### Housing and Sheltering Committee:

Andrea Battle

Nancy Gregg, Co-chair

John Horik

Thomas Kegelman

Craig Meadows

Greg Stutsman, Co-chair

#### Community Preservation Committee:

Marilyn Blaustein

Paris Boice, Chair

Jim Brissette, Vice Chair

Peter Jessop

Jim Oldham

Pari Riahi

Dianna Stein

Nate Budington

### **The report builds on past work, particularly the following plans and studies:**

Karen Sunnarborg Consulting and Abacus Architects + Planners, *Housing Production Plan*, 2013.

RKG Associates Inc., *Amherst Housing Market Study*, 2015.

# EXECUTIVE SUMMARY

---

## Purpose and Background

The overall intention of this Plan is threefold:

- Establish a deliberate focus to the work of the Trustees and the use of Trust resources, including Trust funds and property
- Ensure that the Trust is used to further town goals and objectives to address local housing needs and reinforce interrelated community preservation and development goals
- Establish transparency and strong communication of the Trustees' five-year goals and priority initiatives

The town created the Amherst Affordable Housing Trust, per MA General Laws Chapter 44 Section 55C (MGL c.44 s.55C), in April 2014. The purpose of the Trust, as stated in the town's General Bylaws, is to provide for the creation and preservation of affordable housing for the benefit of low- and moderate-income households

---

## Planning Process

The Trustee's engaged planning consultant, JM Goldson, to assist with creation of this Plan. The consultant worked with the Trustees, Housing and Sheltering Committee members, and interested members of the public to clarify the Trust's role and identify priority initiatives.

---

## Mission

The Trust's mission, as an instrument of town government, is to promote the town's affordable housing priorities as determined through the most recent town housing plan, particularly to create safe, decent, and affordable housing for our most vulnerable populations.

---

## Five-Year Goals

**Goal 1 Actively Foster Development**

**Goal 2 Support Homelessness Prevention Initiatives**

**Goal 3 Seek Opportunities to Promote Conservation-Based Development**

**Goal 4 Enhance Local and Regional Collaboration**

**Goal 5 Expand Availability of Direct Housing Assistance**

**Goal 6 Promote Outreach and Education**

---

## Priority Initiatives

**FY2018-2019**

1. Advocate for adoption of town property disposition policy with explicit priority for transfer of appropriate town-owned properties to the trust for creation of affordable housing.
2. Secure transfer of at least one town-owned property to trust for creation of affordable housing.
3. Establish funding thresholds and underwriting criteria.
4. Foster development/redevelopment to create supportive enhanced SRO housing.

### **FY2020-2022**

5. Foster development of second town-owned property.
6. Foster strong communication and integrated efforts among the various housing entities active in Amherst.
7. Explore establishing new or expanding existing housing assistance programs.

#### Ongoing

8. Actively advocate for initiatives to address homelessness and support homelessness prevention
9. Advocate for town policy and regulations to further promote affordable housing and provide active political support for local housing initiatives.
10. Promote public awareness and outreach to grow more support and understanding of local affordable housing initiatives through print, online, and media campaign.
11. Review all affordable housing development proposals including Comprehensive Permit applications and developments subject to the Inclusionary Zoning bylaw.

## REPORT ORGANIZATION

- Chapter 1 describes the purpose of this plan, provides background information about the Amherst Affordable Housing Trust, and provides general information about eligible uses of trust funds and models for the relationship between the Community Preservation Act and trusts.
- Chapter 2 describes the Trust's mission, five-year goals, priority initiatives, operating framework, and budget.
- Appendix I provides the Trust's bylaws, as amended in May 2017.
- Appendix II provides a summary of the strategic planning work session held with the Board of Trustees and the Housing and Sheltering Committee on October 5, 2016.

# CHAPTER I

## INTRODUCTION

---

### Strategic Plan Purpose

Through this planning effort, the Amherst Affordable Housing Trust's Board of Trustees developed a clear understanding of its five-year goals, priority initiatives, and how the trust will operate. The overall intention of this Plan is to layout the results of this process. Specifically, the purpose of this plan is threefold:

- Establish a deliberate focus to the work of the Trustees and the use of Trust resources, including Trust funds and property
- Ensure that the Trust is used to further town goals and objectives to address local housing needs and reinforce interrelated community preservation and development goals
- Establish transparency and strong communication of the Trustees' five-year goals and priority initiatives

---

### Amherst Affordable Housing Trust

To implement a recommendation of Amherst's 2013 Housing Production Plan, the town created the Amherst Affordable Housing Trust, per MA General Laws Chapter 44 Section 55C (MGL c.44 s.55C), in April 2014. The purpose of the Trust, as stated in the town's General Bylaws, is to provide for the creation and preservation of affordable housing for the benefit of low- and moderate-income households.

### BOARD OF TRUSTEES

The Board of Trustees' (Trustees) primary purpose is to oversee the Amherst Affordable Housing Trust funds. At FY2017 Annual Town Meeting, the Town amended the Trust bylaw to expand the Trustees from seven to nine members and incorporate the Housing and Sheltering Committee's purpose and responsibilities. The Trustees must include one member of the Select Board per statute and one member of the Housing and Sheltering Committee per town bylaws. The Select Board has the authority to appoint the other members, which are required to be town residents "who would bring to the Trust relevant personal and/or professional experience and knowledge in real estate, finance, affordable housing, banking, architecture, social services, or the like."

The powers and authority of the Trustees are set forth in accordance with MGL c.44 s.55C with the exception that the following three powers are subject to the following limitations per the local bylaws:

- Any purchase, sale, lease, exchange, transfer or conveyance of any interest in real property must be approved by five of the seven voting members.
- The Trustees may incur debt, borrow money, grant mortgages and pledge Trust assets only in an amount not to exceed 80 percent of the Trust's total assets.
- Any debt incurred by the Board shall not constitute a pledge of the full faith and credit of the

Town of Amherst and all documents related to any debt shall contain a statement that the holder of any such debt shall have no recourse against the Town of Amherst with an acknowledgement of said statement by the holder.

It is the Trustees' fiduciary responsibility, bestowed by Town Meeting, to ensure that the Trust funds are used in a responsible manner. The Trustees are required to provide for an annual audit of the books and records of the Trust, which must be conducted by an independent auditor. The Trustees must provide a copy of the receipt of audit to the Select Board.

Furthermore, the Trustee's work is but one facet of the Town's goal to maintain a high quality of life for its current and future residents, and, therefore, should be coordinated through open dialogue with other town officials, boards, committees, and commissions.

## TRUST REVENUE AND EXPENDITURES

The Trust received \$25,000 of Community Preservation Act (CPA) funds in 2016, which were partially used to support legal fees (\$500) and this strategic planning effort (\$13,600). The remaining \$10,900 is anticipated to be used for site and building feasibility studies for East Street School, Old Farm Road, and/or other properties. As approved at the FY2017 Annual Town Meeting, the town awarded \$20,000 of CPA fund for a professional staff position to support Trust initiatives.

---

## Local Housing Needs and Objectives

### HOUSING NEEDS

Although the information summarized below is slightly dated, the 2013 Housing Production Plan (2013 HPP) presents the most recent analysis of priority local housing needs. The Housing and Sheltering Committee worked closely with the consultant to prepare the 2013 HPP. The 2013 HPP describes the following characteristics and trends as indicators of housing need and is largely excerpted from the 2013 HPP:

- Housing growth has not kept up with population growth. The population grew by 176 percent between 1960 and 2010, but housing increased by only 125 percent in this period. Also, population growth is closely linked to student enrollments. Most Amherst's residents, almost 60 percent, are college students.
- Because housing supply has not kept up with increasing demand, Amherst has higher housing prices and residents are paying more than they can afford to live in Amherst.
- There are declining numbers of children and families and increasing numbers of older adults and those who are living alone in the community. People age 25 to 44 decreased from 7,323 in 1990 to 4,009 in 2010.
- Presence of students in off campus housing will continue to increase as University of Massachusetts grows.
- If these trends continue, Amherst will become a community mostly comprised of students and seniors.
- Vacancy rates for both owner and rental units are low, reflecting tight market conditions.

- As of 2011, there was an affordability gap (the difference between what a median income household can afford and the median priced unit on the market) of \$92,000 for single-family houses and \$26,500 gap for condos.
- Although there was not an estimated shortage of units affordable to those earning above 80 percent of the area median income (a.k.a. “workforce housing”), does not mean that the units that are available to those above this level are in standard condition.
- About 80 percent of households with income at or below 30 percent AMI spend more than 50 percent of their income on housing costs; 44 percent of households with income between 30 and 50 percent AMI; 13 percent of households with income between 50 and 80 percent AMI; and just over 1 percent of households with income over 80 percent AMI.
- The largest unmet need is housing for people with disabilities, followed by housing suitable for families; and for seniors. In addition, there is an unmet need for housing for persons who are experiencing chronic homelessness.

These characteristics and trends suggest a significant need for:

- Family rental housing, particularly for families with very low income
- Smaller affordable units for individuals, including persons now accommodated in the shelter
- Appropriate housing for students to reduce demand on the housing market in Amherst
- Preservation of existing affordable rental units
- Affordable homeownership for families with low- and moderate-income
- Housing for at-risk and special needs populations that require special services and handicapped accessibility

## AMHERST HOUSING GOALS AND OBJECTIVES FROM THE 2010 MASTER PLAN

As summarized in the 2013 HPP, the Town’s 2010 Master Plan provide the following housing goal and objectives:

### Overriding 2010 Master Plan Housing Goal

Provide a mix of housing that meets the physical needs of and is affordable to the broadest possible spectrum of our community, and that minimizes the impact on the environment.

### 2010 Master Plan Housing Objectives

- Encourage a greater mix of housing types, sizes, and prices serving a wider range of income levels than is currently available throughout Amherst. Encourage the development of economically diverse neighborhoods.
- Preserve and expand the number of affordable and moderately priced rental units and housing stock.
- Increase the opportunity for infill development and the location of housing developments near services.
- Encourage the production of housing in an environmentally sound manner with respect to design, siting, materials and resource use.
- Encourage housing that meets the needs of special populations.



- Improve housing and services for people in the area who are homeless.
- Support the creation of taxable student housing that will lessen the pressures on residential neighborhoods.
- Build and sustain the Town's capacity for regulatory oversight for Amherst's housing stock, and pursue ways to enhance security

---

## Eligible uses of Trust Funds & Legal Considerations

Uses of Trust funds must comply with the statutory purpose of the Trust per MGL c.44 s.55C – the creation and preservation of affordable housing for the benefit of low- and moderate-income households. The following briefly summarizes eligible activities for creation and preservation – for a more detailed description and examples, please refer to the Massachusetts Housing Partnership's *Municipal Affordable Housing Trust Operations Manual* (MHP Manual).<sup>1</sup>

### CREATION

Activities to create, or produce, affordable housing include the following:

- New construction of affordable housing
- Rehabilitation of existing buildings to convert to affordable housing (could include conversion of surplus town buildings, such as surplus schools or libraries, or privately-owned buildings, such as former churches)
- Purchase of existing market rate residential units, rehabilitation if necessary for health and safety purposes, and resell as affordable housing
- Establish homebuyer assistance program to convert market rate units to affordable units

### PRESERVATION

Preservation of affordable units refers to initiatives to perpetuate existing affordable units in light of restrictions that would otherwise expire. Preservation is sometimes also described as physically preserving the condition of existing affordable units, however it is unclear if this is the intent of the statute. Note that CPA funds cannot be used for rehabilitation until the property was previously acquired or created using CPA funds.

### LOW- AND MODERATE-INCOME

Since the Trust statute doesn't offer a definition of the term "low- and moderate-income" the MHP Manual advises Boards to use their judgment and consult other definitions commonly used in state and federal programs. It may be wise to consult with municipal counsel if the Board chooses to a definition that is not commonly used in state and federal program. The Community Preservation Act (CPA), for example, sets an income threshold of 100 percent AMI and the MA Affordable Housing Trust Fund can be used to benefit households with incomes up to 110 percent AMI.

---

<sup>1</sup> Massachusetts Housing Partnership, *Municipal Affordable Housing Trust Operations Manual: How to effectively operate your local trust*, November 2015.

## SUPPORT

The 2017 amendment to MGL c.44 s.55C clarified that any eligible use of CPA funds for affordable housing, including activities covered under “support,” is also an eligible use of Municipal Affordable Housing Trust funds. The trust funds can also be used to support the work of the Trustees with professional staff/consultants, legal assistance, clerical support, and the like.

## USE OF CPA FUNDS

The 2017 amendment to MGL c.44 s.55C also clarified that restrictions on the use of CPA funds remain in force even after CPA funds are transferred to a Municipal Affordable Housing Trust and requires the use of those funds by the Trust be included in the CPA reporting to the Department of Revenue. Through the Trust’s bylaw, as amended at the FY2017 Annual Town Meeting, the requirement that all CPA funds received by the Trust, shall be used exclusively for community housing and remain subject to all the rules, regulations, and limitations of the CPA statute.

---

## Community Preservation Act and the Trust

As it currently stands, the Trustees are viewed as a candidate to apply for CPA funds. Town Meeting approved the first award of CPA funds to the Trust in May 2015. Since that time, the Trust received additional allocations from the CPA fund to fund a staff position, as described elsewhere in this chapter. Based on the consultant’s observations, there are three primary models for CPA allocations to housing trusts in Massachusetts:

### MODEL #1. TRUST AS HOUSING ARM OF THE CPC

- CPA funds allocated for housing are included in annual budget to the Housing Trust. No annual application is necessary. CPC and Trust membership may overlap, which can increase regular communication and collaboration. This model has an expectation of standard designated percentage allocation of CPA funds to the Trust annually, which would consist of all intended CPA housing funds. Housing applicants would apply solely to the Trust.

### MODEL #2. HYBRID – STANDARD PERCENTAGE ALLOCATION AND ABILITY FOR ADDITIONAL ALLOCATIONS

Trust budgeted to receive a standard percent and applies for additional funding on as-need basis based on anticipated project or programs. CPC and Trust membership may or may not overlap in this model. Somerville is an example of this model where there CPC and Trust membership does not overlap but the Trust receives a percentage (roughly 45 percent) of CPA funds and Trust may request additional allocations, as needed.

### MODEL #3. TRUST AS APPLICANT

The Housing Trust submits requests to the CPC for CPA funds based on specific projects or programs or an annual Trust budget that includes general Trust-initiatives anticipated. This model is most typical in smaller communities where housing activity is low. Developers can apply separately to the CPC and the Trust for local housing funds (with possibly little or no coordination between the CPC and Trust in reviewing the separate applications).

Trust cannot rely on CPA funds as a consistent revenue stream, which creates uncertainty year-to-year.

In Amherst, the Community Preservation Act Committee and the Trust currently operate under Model #3. As part of preparing this plan, the Trustees considered these various models. More discussion about how the model might evolve is included in Chapter 2 under the “Operating Approach” section.

---

## Framework for Trust Operating Approach

Municipal Affordable Housing Trusts (MAHT) can operate as an active initiator, a more-passive funder, or a combination of both. As an initiator, a trust would utilize its funding or property to foster specific projects or programs, such as affordable housing development or a program that offers direct housing assistance. As a funder, a trust could operate as a funding source – calling for and reviewing applications or proposals from private or public entities to create or preserve affordable housing. A trust does not have to choose one approach over another, but could also operate as a mixture of both initiator and funder.

# CHAPTER 2

## GOALS & STRATEGIES

This chapter includes the Trust's updated mission, goals, operating approach, strategies – both priority initiatives and operating strategies – and a five-year budget to support these strategies.

### Mission

The Trust's mission, as an instrument of town government, is to promote the town's affordable housing priorities as determined through the most recent town housing plan, particularly to create safe, decent, and affordable housing for our most vulnerable populations.

### Five-Year Goals

The Trust's five-year goals respond strategically to Amherst's housing needs and the direction provided through this planning effort.

#### SUPPORTIVE HOUSING

Links decent, safe, affordable housing with support services designed to help individuals and/or families stay housed and live a productive life in the community. It looks and functions like any other brand of housing. The difference is residents can access, at their option, services designed to building independent living and tenancy skills, assistance with integrating into the community, and connections to community-based health care, treatment, and employment services.

Source: United States Interagency Council on Homelessness, [www.usich.gov](http://www.usich.gov), accessed April 2016.

#### SRO AND ENHANCED SRO HOUSING

Single Room Occupancy housing is a residential property that includes multiple single room dwelling units that is for occupancy by a single eligible individual. Enhanced SROs (a.k.a. studio apartment) include a bathroom and kitchenette). Some SRO housing include common spaces.

Source: United States Department of Housing and Urban Development, *Understanding SROs*, January 2001 [www.hudexchange.info/resources/doc](http://www.hudexchange.info/resources/doc), accessed April 2017.

### GOAL 1 ACTIVELY FOSTER DEVELOPMENT

To actively foster affordable housing development that meets Amherst's documented local housing needs, the trustees will take measures to prepare the way to enable development as quickly and effectively as possible.

- Acquire town-owned and/or private properties near services and amenities.
- Prioritize creation of enhanced SROs to support the special needs of chronically homeless individuals and families with income below 30 percent and between 30 and 50 percent AMI.
- Develop relationships and work collaboratively with local and regional community development corporations and other development entities.

### GOAL 2 SUPPORT HOMELESSNESS PREVENTION INITIATIVES

Advocate for town policies, regulations, and actions, including regulatory actions, that help address Amherst's well-documented housing needs and achieve local housing goals, especially homelessness prevention by funding and advocating for the creation of transitional and/or

permanent supportive housing as well as supporting, through advocacy and other non-financial means, the availability of a seasonal emergency shelter, and other programs to address homelessness and homelessness prevention.<sup>2</sup>

### **GOAL 3 SEEK OPPORTUNITIES TO PROMOTE CONSERVATION-BASED DEVELOPMENT**

Work collaboratively with the local Conservation Commission and local/regional land trusts to sensitively integrate land conservation with development of environmentally sound, appropriately designed and sited affordable housing options, including family rental and ownership housing for households with income at or below 80 percent AML.

### **GOAL 4 ENHANCE LOCAL AND REGIONAL COLLABORATION**

Reinforce and enhance communication and collaboration among local and regional public and private, non-profit housing entities to best address Amherst's priority housing needs.

### **GOAL 5 EXPAND AVAILABILITY OF DIRECT HOUSING ASSISTANCE**

Fund expansion of existing local public/private programs and initiatives that provide direct housing assistance to qualifying households, such as local rental assistance vouchers and first-time homebuyer programs.

### **GOAL 6 PROMOTE OUTREACH AND EDUCATION**

Create and/or disseminate information regarding local and regional housing needs as well as housing assistance and homelessness resources.

---

## **Operating Approach & Relationship with CPA Funds**

### **SHORT TERM**

Through focused discussion with the Trustees and consideration of the three primary approaches to operating a housing trust<sup>3</sup>, the Trustees believe they can benefit the town most by operating as an initiator – an active role that will give the Trustees maximum control over use of trust funds and optimize opportunities to utilize town-owned property to foster development of affordable housing and establish housing assistance programs in addition to undertaking an educational and advocacy role.

This approach is ideal for a board that wishes to have an active role to foster housing initiatives, rather than the more passive approach of a funder taking in funding requests/applications from third parties. Recognizing that the community already benefits from multiple existing organizations that are actively working to create and preserve affordable housing in Amherst in addition to the Town's initiatives, the working group participants envisioned that the most beneficial role for the Trust would be to coordinate, reinforce, and expand these efforts. In addition, trustees do not

---

<sup>2</sup> Note: the statutory purpose of a Municipal Affordable Housing Trust is to create and preserve affordable housing – an emergency shelter is a service and not considered affordable housing, therefore the Trust funds cannot be used directly to support the emergency shelter, but could be used to create or preserve transitional or permanent supportive housing.

<sup>3</sup> The three primary operating approaches for a trust are as an initiator, funder, or hybrid. These approaches are described in Chapter I under the "Framework for Trust Operating Approach" section.

want to duplicate efforts of the Community Preservation Act Committee's (CPAC) to solicit and recommend funding applications for housing initiatives.

## LONG TERM

The trustees anticipate this role may evolve over time. The trustees plan to initiate projects or programs over the next few years, but may reconsider this role in years to come as opportunities for supporting private development projects as a funder may arise. A trust can be a highly effective vehicle to further affordable housing initiatives in a timely and predictable way because the allocation of trust funds does not depend on authorization from town meeting. Therefore, the trustees may initiate discussions with the CPAC and town officials to consider utilizing the trust as the local housing arm of the CPAC at some point in the future. The five-year Trust budget incorporated in this report anticipates this relationship and responsibility beginning in FY20.

---

## Priority Initiatives

The following initiatives, described below, detail how the Trust funds will be used to address the Trust's goals. The initiatives, listed in brief below and in more detail to follow, are categorized by recommended year(s) of implementation as well as ongoing initiatives.

### FY2018-2019

1. Advocate for adoption of town property disposition policy with explicit priority for transfer of appropriate town-owned properties to the trust for creation of affordable housing.
2. Secure transfer of at least one town-owned property to trust for creation of affordable housing.
3. Establish funding thresholds and underwriting criteria.
4. Foster development/redevelopment to create supportive enhanced SRO housing.

### FY2020-2022

5. Foster development of second town-owned property.
6. Foster strong communication and integrated efforts among the various housing entities active in Amherst.
7. Explore establishing new or expanding existing housing assistance programs.

### Ongoing

8. Actively advocate for initiatives to address homelessness and support homelessness prevention
9. Advocate for town policy and regulations to further promote affordable housing and provide active political support for local housing initiatives.
10. Promote public awareness and outreach to grow more support and understanding of local affordable housing initiatives through print, online, and media campaign.
11. Review all affordable housing development proposals including Comprehensive Permit applications and developments subject to the Inclusionary Zoning bylaw.

## FY2018-2019 (YEARS 1-2)

### **1. Advocate for adoption of municipal property disposition policy with explicit priority for transfer of appropriate town-owned properties to the trust for creation of affordable housing (Year 1)**

The trustees should work closely with town officials including the Town Manager as the town creates an official municipal property disposition policy. Arguably, the Trust's most efficacious power is to acquire and dispose of real property. Municipal disposition policies often apply to land disposition requests made by individuals or organizations, land disposition recommendations initiated by the town, the sale of tax foreclosed property, and the sale of land of low value. They provide a uniform method for reviewing land disposition requests and intend to ensure that decisions are well considered and address the needs and goals of the town. Such a policy can establish a land sale committee, or other such entity, that is responsible to review municipal properties for possible sale and recommend its findings to the Select Board.

Given the critical need for affordable housing in Amherst, such a municipal property disposition policy should prioritize consideration of properties for creation of affordable housing. Ownership of appropriate properties would be transferred to the Trust to create affordable housing. In addition, the trustees should advocate for at least one seat on the land sale committee.

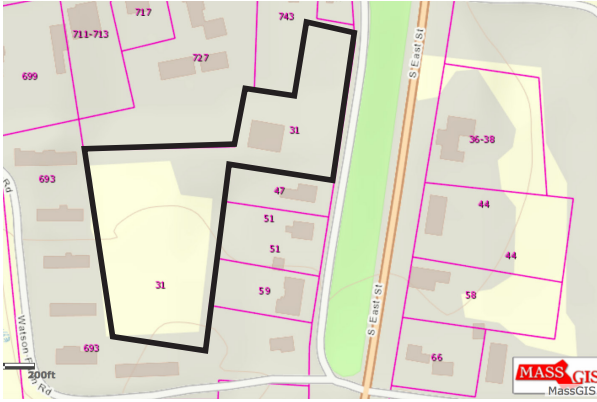
Potential Cost Assumptions: This initiative will require time and effort on the part of trustees and trust staff, however shouldn't require any allocation of trust funds (outside of supporting staffing costs).

### **2. Secure transfer of at least one town-owned property to trust for creation of affordable housing (Year 1)**

A developer wants a predictable path to site control and offering public land for affordable housing development provides a substantial subsidy to help make such development feasible. The Trust is designed for this function. Through the transfer of town-owned property to the Trust, the Trust would foster the creation of affordable housing by setting the table through preliminary due diligence work, which could include surveys, title work, environmental assessments/testing, and securing zoning amendments, if needed.

The Trust would develop a well-crafted Request for Proposal (RFP) to seek a developer with a good track record for doing similar projects. Such an RFP would be crafted to help shape the project to meet local housing needs. Trust funds could also be allocated to the selected project for additional funding support, if needed.

One municipal property to consider transferring to the Trust is the East Street School, 31 South East Street.



EAST STREET SCHOOL SITE AT 31 SOUTH EAST STREET

The site is about 2.3 acres and is owned by the Town of Amherst in custody of the School Department and is roughly one mile from Amherst town center. The brick school building was constructed c. 1893 and used as an elementary school until 1973.<sup>4</sup> The school building was designed by Charles Edward Park in the Romanesque Revival style, but has been altered over time and suffered damage during a fire in 1936.<sup>5</sup> The site is a contributing property to the East Village National Register District.

Other town-owned sites may be considered for potential transfer to the Trust for such purposes instead of or in addition to the East Street School property.

Potential Cost Assumptions: \$10,000 to support minimal legal/filing fees associated with ownership transfer of the property.

### 3. Establish funding thresholds and underwriting criteria (Year 1)

To lay a foundation for the trustees to utilize Trust funds wisely, the trustees should adopt funding thresholds and underwriting criteria to ensure that its limited resources are utilized in the most effective manner possible. The purpose of funding thresholds is to guide the trustees' funding contribution to development projects.

Examples of funding thresholds for consideration:

- *Consistency with Amherst's community development and preservation goals*
- *Consistency with fair housing* to affirmatively encourage equity, promote housing choice, enhance mobility, and promote greater opportunity.
- *Term of affordability* for as long as possible under the law and realities of funding.
- *Targeted affordability* to most critical housing needs – namely, production of supportive SRO/enhanced SRO housing for currently/formerly homeless individuals and affordable rental housing for families at or below 50 percent AMI.

<sup>4</sup> Massachusetts Historical Commission, *Historic Survey Form B: Old East Street School*, AMH.656.

<sup>5</sup> Ibid.



- *Financial feasibility* but with flexibility to allow for the Trust funds to be used as the first dollars in on a case-by-case basis when demonstration of local support is beneficial at early stages of a project.
- *Maximum leveraging of Trust Funds.*

The trustees should adopt underwriting criteria for trust-funded development initiatives to ensure the trustees appropriately fulfill their fiduciary responsibilities. Standard underwriting criteria includes: maximum award amounts, approval of permits and any other government approvals, award terms, maximum developer and contractor profits and overhead, etc. maximum per unit cost (further leveraging of funds).

Potential Cost Assumptions: This initiative will require time and effort on the part of trustees and trust staff, however shouldn't require any allocation of trust funds (outside of supporting staffing costs).

#### **4. Foster development/redevelopment to create supportive enhanced SRO housing (Year 2)**

To help address Amherst's most critical housing needs, as is well documented in the town's 2013 Housing Production Plan, trustees have prioritized development of supportive enhanced SRO housing for currently/formerly homeless individuals.

As described in Initiative 2, offering low/no cost land for development or redevelopment can provide a significant subsidy to help make an affordable housing development feasible. If not yet available for the subject property, the trustees should conduct a basic physical site assessment to determine potential development yield and rehab needs for any existing structures. The site analysis would assess the availability of utilities as well as regulatory and legal limitations (e.g., local zoning, easements, or deed restrictions).

The trustees would issue a Request for Proposal for the disposition of municipal property (per MGL c.30B) that specifies the type of housing, target population, and minimum number of units. The minimum number of units should be established by testing the feasibility – estimate how the affordable unit minimum may impact project feasibility and the need for public subsidies and anticipate enough density to support project feasibility.

The trustees may sell or retain the property under Trust ownership and lease it to a developer through a long-term ground lease. With a ground lease, the developer builds, owns, and manages the building but the Trust can establish certain criteria for the project that become restrictions and provisions in the ground lease. This ownership structure allows the Trust to create housing without having to administer the construction or management of the housing itself and provides strong assurances for long-term affordability of the units.

Potential Cost Assumptions: \$25,000-49,000 to support due diligence/predevelopment and up to \$200,000 additional subsidy to support development.

## FY2020-2022 (YEARS 3-5)

### **5. Acquire additional property and foster second development (Year 3-5)**

In Year 4, begin process to develop a second site to be acquired either through town transfer of town-owned property or acquisition of private property. This strategy recommendation will be similar in scope and process to strategy #4, above.

Potential Cost Assumptions: \$10,000 legal/filing fees, \$25,000-49,000 to support due diligence/predevelopment, and up to \$200,000 additional subsidy to support development.

### **6. Foster strong communication and integrated efforts among the various housing entities active in Amherst (Years 3-5)**

Provide overall coordination to foster strong communication and integrated efforts among the various housing entities, including non-profit community development corporations, other non-profit housing organizations, and the town. For example, the Trust could convene a regular affordable housing round-table and take a lead role in communications about housing in Amherst with a housing newsletter, web news updates, and/or regular public updates about local housing initiatives of the trusts and other public/private entities to town officials.

Potential Cost Assumptions: This initiative will require time and effort on the part of trustees and trust staff, however shouldn't require any allocation of trust funds (outside of supporting staffing costs).

### **7. Investigate establishing new or expanding existing housing assistance programs (Year 5)**

In Year 5, investigate creation of one or more new housing assistance programs or provide funding to expand one or more of the existing housing assistance programs in Amherst either to increase number of households assisted and/or to deepen the existing subsidy levels. These programs could provide be assistance with rental costs, including a rent-to-own program, or home buying costs. Housing assistance programs require marketing, administration, and oversight, which could be performed by qualified town staff, the local housing authority, or a qualified non-profit organization.

#### **Local Rental Assistance Programs**

This type of program is modeled after the federal Housing Choice Voucher (formerly known as Section 8 Vouchers) and the Massachusetts Rental Voucher Program and would utilize local funds to provide direct assistance to subsidize the difference between market rents and what an eligible household can afford to pay (typically up to 30 percent of gross income). This type of program has intense administrative needs, which could also be funded with Trust funds.

#### **Local Homebuyer Programs**

First time homebuyer assistance programs and buy-down programs can convert existing homes to permanently restricted affordable units and tend to be structured in one of the following ways:

- Subsidy Model: This type of program provides a subsidy to qualified households to write-down a mortgage to an affordable level. In return, a permanent deed restriction would be required to ensure the unit remains affordable upon resale.
- Purchase/Rehab Model: This type of program involves purchasing housing units and reselling the units to qualified households as affordable deed-restricted units that count on the SHI. Buy-down programs will often require some rehabilitation costs to bring units up to code.

Alternatively, a homebuyer program can provide down payment and closing cost loans with recapture provisions. This type of program does not create a permanently restricted affordable unit.

Potential Cost Assumptions: Although it is premature to estimate a potential budget before knowing the nature of the program and if there are any administration needs, the trust could tentatively use \$100,000 as a placeholder for subsequent evaluation and adjustment.

## ONGOING

### **8. Actively advocate for initiatives to address homelessness and support homelessness prevention**

A core purpose of the Housing and Sheltering Committee, which is encompassed by the Trust, is to address homelessness and support homelessness prevention in Amherst. Per the 3-County Continuum of Care Seasonal Shelter Data Report (Nov 2015-May 2016), Craig's Doors emergency shelter in Amherst had 189 total guests, 88 percent of which were between the ages of 25 and 59 years and 70 percent of which had a disability.

The trustees should work closely with public officials, local and regional advocates, and agencies to advocate for support of the emergency shelter and homelessness prevention efforts.

Potential Cost Assumptions: This initiative will require time and effort on the part of trustees and trust staff, however shouldn't require any allocation of trust funds (outside of supporting staffing costs).

### **9. Advocate for town policy and regulations to further promote affordable housing and provide active political support for local housing initiatives**

Amherst is a progressive community that has been well recognized in the state as a leader in promoting affordable housing and supporting community diversity. The trustees should work closely with town officials to advocate for local policies and regulations, including zoning regulations, that further promote creation of affordable housing in Amherst, especially efforts to address the needs of Amherst's most vulnerable populations as well as low/moderate-income and middle-income households (to support housing needs as indicated through most recent housing needs assessment or comparable analysis)

Potential Cost Assumptions: This initiative will require time and effort on the part of trustees and trust staff, however shouldn't require any allocation of trust funds (outside of supporting staffing costs).

## **10. Promote public awareness and outreach to grow more support and understanding of local affordable housing initiatives through print, online, and media campaign.**

Implement a local public awareness campaign to build and maintain support for as well as respond to opposition to affordable housing initiatives. Towards that end, such a campaign would clearly articulate the unmet housing needs and demand for new housing outlined in this plan to public and private partners and, more broadly, to the public. The trust should actively raise public awareness about local housing initiatives and celebrate milestones for future initiatives. Creating an informed public will help build support for the other strategies laid out in this plan. For example, some activities the trust could support:

- Distribute relevant information via the town's website, local news outlets, and by working with community partners
- Hold an annual housing forum to discuss progress towards housing goals and celebrate successes
- Consider creating a "Yes in My Backyard" affordable housing online toolkit to promote understanding of the benefits of affordable housing to communities, including items like fact sheets, presentations, and downloadable exercises for neighborhood groups

Potential Cost Assumptions: \$1,000-2,000 annual budget to cover printing, design, postage, and similar expenses for outreach materials.

## **11. Review all affordable housing development proposals including Comprehensive Permit applications and developments subject to the Inclusionary Zoning bylaw**

The trustees, especially in light of the recent merger with the town's Housing and Sheltering Committee, should actively participate in development review of affordable housing development to advocate support of proposals that help address Amherst's housing needs.

Potential Cost Assumptions: This initiative will require time and effort on the part of trustees and trust staff, however shouldn't require any allocation of trust funds (outside of supporting staffing costs).

---

## **Operating Strategies**

The most effective housing trusts operate with transparency, strong communication, clear and strategic priorities, and professional capacity. Well considered operating strategies can help the Trustees be more productive, efficient, and successful in achieving its mission, and can help ensure that the Trustees comply with relative laws and regulations.

### **BOARD MEMBERSHIP & THE HOUSING AND SHELTERING COMMITTEE**

Through working on this plan, the Board of Trustees and the Housing and Sheltering Committee (HSC) members identified many benefits to merging the two committees. Since this initial work,

the Town has increased the Board membership to incorporate members of the Housing and Sheltering Committee. The two entities roles, while different, are compatible, not exclusive, and with the expanded membership and energy that the merger could facilitate, the formation of subcommittees could be possible to help focus their efforts. At the time of this writing, the Select Board has already begun appointing members of the HSC to the Board of Trustees with only one member of the HSC not currently appointed to the Board. Town Meeting amended the Trust bylaw in May 2017 to expand the powers of the Trust to incorporate the objectives of the HSC and possibly increase the Board of Trustees membership from seven to nine.

## SUBCOMMITTEES OR WORKING GROUPS

To undertake the initiatives laid out in this plan and to ensure maximum operating efficiency and effectiveness, the Trustees should establish subcommittees or working groups to meet one or more times between trust meetings and to undertake discrete tasks related to the subcommittee's purpose.

All trustees, except the chair, should be expected to actively participate in one subcommittee and report back to the full board at its regular monthly meeting. Trustee meetings should include standard agenda topics for reporting on subcommittee work.

It is important to properly notice meetings that are subject to the MA Open Meeting Law. The town attorney/counsel's advice should be sought if requirements for subcommittees or working group meetings need additional clarity.

## STRATEGIC MANAGEMENT

The Trustees' regular meetings will naturally be mostly focused on immediate responsibilities and achieving next steps on current initiatives. Strategic planning and management requires dedicated time where achievement of longer-term goals and objectives can receive regular attention. Toward this aim, the Trustees should hold no less than one annual strategic planning meeting, where the agenda is devoted to evaluating progress toward meeting Trust goals and developing implementation plans to stay on track.

## EXPAND PROFESSIONAL PLANNING RESOURCES

Secure funding part-time professional planning services to provide additional help targeted to coordinate and implement the Trustees' initiatives and provide day-to-day momentum between Trustee meetings and professional guidance.

## ANNUAL AUDIT

As required by the housing trust statute (MGL c.44 §55C (h), the books and records of the trust shall be audited annually by an independent auditor in accordance with accepted accounting practices. The Trust funds may be allocated to pay for the annual audit.

## Five-Year Budget

The budget presented here is intended for planning purposes only as it is based on rough estimates of projected expenses associated with priority initiatives and professional support and potential revenue needed to support these expenses. In addition, the budget anticipates that by the final three-years of this budget horizon (FY20-22), the trust will work with the CPAC and town officials to consider the trust undertaking an expanded role as the CPAC housing arm, as discussed further in chapters 1 and 2. The budget will require annual amendment to reflect actual costs of initiatives and revenues.

	FY18	FY19	FY20	FY21	FY22	5-Year Total	Notes
<b>Revenue</b>							
Funds carry forward from prior year	\$10,900	\$10,209	\$13,709	\$92,209	\$25,709		
CPA Appropriation (FY18 reflects \$20,000 already approved plus an additional \$50,000 to be requested for fall Town Meeting CPAC cycle).	\$70,000	\$175,000	\$280,000	\$285,000	\$315,000	\$1,125,000	Assumption that Trust is CPAC housing arm by FY20 and receives roughly 45% CPA funds (minus housing debt obligations) - Past 3 years CPA funds allocated for housing were between 41 and 52%
Interest (1%)	\$809	\$1,852	\$2,937	\$3,772	\$3,407	\$11,250	
<b>Total (Revenue)</b>	<b>\$81,709</b>	<b>\$185,209</b>	<b>\$293,709</b>	<b>\$377,209</b>	<b>\$340,709</b>	<b>\$1,147,150</b>	
<b>Expenses</b>							
Professional Staff	\$20,000	\$20,000	\$50,000	\$50,000	\$50,000	\$190,000	Increased staff expense reflects Trust role expanded as the CPAC housing arm.
consulting/legal	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$50,000	
Foster development	\$50,000	\$150,000	\$50,000	\$150,000	\$50,000	\$450,000	Expenses related to Initiatives #2, 4, and 5
Direct Assistance Program	\$0	\$0	\$0	\$0	\$75,000	\$75,000	Expenses related to Initiative #7
Administrative/outreach/advocacy	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500	\$7,500	Expenses related to Initiative #10
Proposals/requests per application for trust funds			\$100,000	\$150,000	\$150,000	\$400,000	
<b>Total (Expenses)</b>	<b>\$81,500</b>	<b>\$181,500</b>	<b>\$211,500</b>	<b>\$361,500</b>	<b>\$336,500</b>	<b>\$1,172,500</b>	
<b>Revenue - Expense</b>	<b>\$209</b>	<b>\$3,709</b>	<b>\$82,209</b>	<b>\$15,709</b>	<b>\$4,209</b>		

# APPENDIX I

## AFFORDABLE HOUSING TRUST BYLAW

As Modified May 2017

---

### ARTICLE 24. Amherst Affordable Housing Trust Bylaw Amendment (Select Board)

---

To see if the Town will vote to amend the Amherst Affordable Housing Trust Fund Bylaw in the General Bylaws of the Town by deleting the ~~lined out~~ language and adding the language in ***bold italics***, as follows:

#### AMHERST AFFORDABLE HOUSING TRUST FUND (ATM April 2014 – Art 14)

1. There shall be a Board of Trustees of the Amherst Affordable Housing Trust Fund, composed of ~~nine seven~~ members, of whom one shall be a member of the Select Board, ~~one shall be a member of the Housing & Sheltering Committee~~, and ***eight five*** shall be qualified residents who would bring to the Trust relevant personal and/or professional experience and knowledge in real estate, finance, affordable housing, banking, architecture, social services, or the like. The Select Board shall appoint the Trustees for terms not to exceed two years, except that three of the initial trustee appointments shall be for a term of one year, so as to allow staggered terms. Said Trustees may be re-appointed at the discretion of the Select Board. Vacancies shall be filled by the Select Board for the remainder of the unexpired term. Any member of the Board of Trustees may be removed by the Select Board for cause after the opportunity of a hearing. Nothing in this section shall prevent the Select Board from appointing the Town Manager as an ex-officio ~~tenth eighth~~ member, without the power to vote.
2. The Trustees are hereby authorized to execute a Declaration of Trust and Certificate of Trust for the Amherst Affordable Housing Trust Fund, to be recorded with the Hampshire County Registry of Deeds and filed with the Hampshire Registry District of the Land Court.
3. The powers of the Board of Trustees, all of which shall be carried on in furtherance of the purposes set forth in M.G.L. c. 44, § 55C, shall include the following:
  - a. to accept and receive real property, personal property or money, by gift, grant, contribution, devise or transfer from any person, firm, corporation or other public or private entity, including but not limited to money, grants of funds or other property tendered to the trust in connection with any ordinance or by-law or any general or special law or any other source, including money from M.G.L. c. 44B (***Community Preservation Act***); ***provided, however, that any such money received from chapter 44B shall be used exclusively for community housing and shall remain subject to all the rules, regulations and limitations of that chapter when expended by the trust, and such funds shall be accounted for separately by the trust; and provided further, that at the end of each fiscal year, the trust shall ensure that all expenditures of funds received from said chapter 44B are reported to the community preservation committee of the city or town for inclusion in the community preservation initiatives report, form CP-3, to the department of revenue;***
  - b. to purchase and retain real or personal property, including without restriction investments that yield a high rate of income or no income;
  - c. to sell, lease, exchange, transfer or convey any personal, mixed, or real property at public auction or by private contract for such consideration and on such terms as to credit or otherwise, and to make such contracts and enter into such undertaking relative to trust property as the Board deems advisable notwithstanding the length of any such lease or contract;
  - d. to execute, acknowledge and deliver deeds, assignments, transfers, pledges, leases, covenants, contracts, promissory notes, releases, ***grant agreements*** and other instruments sealed or unsealed,

necessary, proper or incident to any transaction in which the Board engages for the accomplishment of the purposes of the Trust;

- e. to employ advisors and agents, such as accountants, appraisers and lawyers as the Board deems necessary, notwithstanding administrative and technical support provided through finance, treasurer/collector and accounting departments, and that which may be provided by Town staff in various departments, including but not limited to planning, inspection services and conservation;
  - f. to pay reasonable compensation and expenses to all advisors and agents and to apportion such compensation between income and principal as the Board deems advisable;
  - g. to apportion receipts and charges between incomes and principal as the Board deems advisable, to amortize premiums and establish sinking funds for such purpose, and to create reserves for depreciation depletion or otherwise;
  - h. to participate in any reorganization, recapitalization, merger or similar transactions; and to give proxies or powers of attorney with or without power of substitution to vote any securities or certificates of interest; and to consent to any contract, lease, mortgage, purchase or sale of property, by or between any corporation and any other corporation or person;
  - i. to deposit any security with any protective reorganization committee, and to delegate to such committee such powers and authority with relation thereto as the Board may deem proper and to pay, out of Trust property, such portion of expenses and compensation of such committee as the Board may deem necessary and appropriate;
  - j. to carry property for accounting purposes other than acquisition date values;
  - k. to borrow money on such terms and conditions and from such sources as the Board deems advisable, to mortgage and pledge trust assets as collateral;
  - l. to make distributions or divisions of principal in kind;
  - m. to comprise, attribute, defend, enforce, release, settle or otherwise adjust claims in favor or against the Trust, including claims for taxes, and to accept any property, either in total or partial satisfaction of any indebtedness or other obligation, and subject to the provisions of this act, to continue to hold the same for such period of time as the Board may deem appropriate;
  - n. to manage or improve real property; and to abandon any property which the Board determined not to be worth retaining;
  - o. to hold all or part of the Trust property uninvested for such purposes and for such time as the Board may deem appropriate; and
  - p. to extend the time for payment of any obligation to the trust.
  - q. to take any other action relative thereto.
4. These powers shall be subject to the following limitations;
- a. any purchase, sale, lease, exchange, transfer or conveyance of any interest in real property must be approved by ~~five of the seven voting members~~ **at least 60% of the appointed members.**



- b. the Trustees may incur debt, borrow money, grant mortgages and pledge Trust assets only in an amount not to exceed 80% of the Trust's total assets.
  - c. any debt incurred by the Board shall not constitute a pledge of the full faith and credit of the Town of Amherst and all documents related to any debt shall contain a statement that the holder of any such debt shall have no recourse against the Town of Amherst with an acknowledgement of said statement by the holder.
5. The Board of Trustees shall provide for an annual audit of the books and records of the Trust. Such audit shall be performed by an independent auditor in accordance with accepted accounting practices. Upon receipt of the audit by the Board of Trustees, a copy shall be provided forthwith to the Select Board.
6. *The Board of Trustees will consider the state of housing needs in Amherst across the affordability spectrum. It may make recommendations to the Select Board on the options available to the Town to create new affordable housing to address those needs, and to maintain existing affordable housing stock. The Trust may support implementation of these recommendations as appropriate and measure progress toward their fulfillment. The Trustees may also seek regional solutions and support regional efforts to provide permanent affordable housing. As part of this work, the Trust responsibilities include:*
- a. *Developing goals and objectives for addressing the needs identified in the Town's Housing Production Plan (2013), and in "All Roads Lead Home – the Pioneer Valley's Plan to End Homelessness" (2008), as such plans may be amended from time to time, and/or such other housing plans as the Trustees deem appropriate.*
  - b. *Supporting the availability of a seasonal emergency shelter.*
  - c. *Creating, updating and/or distributing needed outreach and education materials such as guides for housing information or homelessness resources.*
  - d. *May make recommendations on proposals to Town Meeting, or proposals seeking Community Development Block Grant funds and Community Preservation Act funds, when such proposals create or support affordable, workforce and/or extremely low income housing.*

---

**ARTICLE 25. Local Historic District Bylaw Amendment  
(Historic Commission)**

---

To see if the Town will vote to amend the General Bylaws, Article IV, Amherst Local Historic District Bylaw, by adding a new District Area to be known as the North Prospect-Lincoln-Sunset Historic District, as shown in a new Appendix 2, pursuant to M.G.L. Chapter 40C, Section 3.

---

**ARTICLE 26. Public Works Committee Bylaw Amendment  
(Select Board)**

---

To see if the Town will vote to dissolve the Public Works Committee and accordingly, to amend the General Bylaws by rescinding, in Article 1 the bylaw entitled, "Public Works Committee".

---

**ARTICLE 27. Dissolution of Public Transportation Bicycle and Pedestrian Committee (PTBPC)  
(Select Board)**

---

To see if the Town will vote to dissolve the Public Transportation Bicycle and Pedestrian Committee created and amended by prior actions of Town Meeting under Article 20 of the 2015 Annual Town Meeting, Article 31 of the April 24, 1995 Annual Town Meeting and Article 28 of the May 5, 1975 Annual Town Meeting.

## APPENDIX 2

# SUMMARY OF STRATEGIC PLANNING WORK SESSION

---

### Summary

The purpose of this strategic planning work session, held on October 5, 2016, was to engage Municipal Affordable Housing Trust (Trust) members, Housing and Sheltering Committee (HSC) members, and interested members of the public in discussion to clarify the Trust's role and identify priority initiatives. This work session was designed and facilitated by the Trust's contracted housing consultant, Jennifer Goldson of JM Goldson community preservation + planning. The following themes emerged as participants considered the Trust's role, relationship with the HSC, and priority initiatives to undertake in the next five years.

- **Trust's Role:** The Trust's most effective role will be to coordinate, reinforce, and expand the affordable housing initiatives in Amherst undertaken by multiple local/regional housing organizations as well as the Town. In this role, the Trust would focus its efforts to secure funding and real property so that it could solicit proposals to support affordable housing initiatives. This would include providing support with fund allocations, real property acquisition/disposition, professional expertise, and policy/project advocacy. In addition, the Trust would provide overall coordination to foster strong communication and integrated efforts among the various housing entities, including the Town.
- **Relationship with the Housing and Sheltering Committee:** The Trust and the HSC members identified many benefits to considering a merger of the two committees. The two entities roles, while different, are compatible, not exclusive, and with the expanded membership and energy that such a merger could facilitate, the formation of subcommittees could be possible to help focus their efforts.
- **Priority Initiatives:** The Trust and HSC members identified and prioritize three initiatives for the Trust to focus its efforts and resource on between FY17-22: 1) Coordinating role among housing groups; 2) Support creation of transitional and permanently supportive housing (enhanced SROs); 3) Review and recommend affordable housing development proposals. Other ideas were also discussed but received lower priority for focusing on in the five-year time frame.

The following provides a detailed summary of the participants' discussions for the three group exercises: 1) Small Group Discussion Exercise Part I - Trust Role in Relation to Other Housing Entities; 2) Small Group Discussion Exercise Part II – Work on Things that Matter; and 3) Prioritization Exercise.

---

## I) Small Group Discussion Exercise Part I

### Trust's Role in Relation to Other Housing Entities

#### EXERCISE INSTRUCTIONS

Work with your partner(s) to discuss and record responses to the following questions. This is a brainstorming exercise – we are not prioritizing yet – so, write down everything that comes to the minds of you and your partner(s). There is no need for agreement at this stage.

- a) How could the Trust work to advance effectiveness of local housing initiatives and avoid redundancies? For example, fill an unmet need or reinforce/expand the work already being done by others.
- b) How should the Trust's work be coordinated/integrated with the work of the Housing & Shelter Committee? Should the Town pursue merging these committees? Why or why not?

#### SUMMARY OF DISCUSSION

##### Trust's Role

Recognizing that the community already benefits from multiple existing organizations that are actively working to create and preserve affordable housing in Amherst in addition to the Town's initiatives, the working group participants envisioned that the most beneficial role for the Trust would be to coordinate, reinforce, and expand these efforts. To do this, the Trust must work in the short term to secure adequate and, ideally, reliable revenue which would likely include local Community Preservation Act (CPA) funds in addition to possible other funding sources, such as voluntary developer payments, private donations, and/or Inclusionary Zoning payments.<sup>6</sup> With regard to CPA funds, some participants discussed the benefits of potentially, in time, assuming a role as the CPA's affordable housing arm.

In addition, the Trust's role would be enhanced with the acquisition of real property for development / redevelopment, possibly through private donation including university/college properties or transfer of surplus town-owned/tax foreclosed property. Participants also identified a need for expanded professional planning support from paid staff or consultant to effectively operate and fully realize the role envisioned here.

As working group participants discussed, the Trust would allocate and leverage these resources (funds and/or property) on a competitive basis primarily to promote and support the affordable housing initiatives of existing organizations, with priority given to initiatives to create transitional and permanently supportive housing (enhances SROs), as discussed more in the Prioritization Exercise, below.

In addition, the working group participants envisioned the Trust would provide overall coordination to foster strong communication and integrated efforts among the various housing entities, including the Town.

---

<sup>6</sup> Note: Amherst's existing Inclusionary Zoning Bylaw (Article 15) does not allow cash payments in lieu of units and would require amendment should such an option be desired. Such payment could be designated for the Trust.

For example, the Trust could convene a regular affordable housing round-table and take a lead role in communications.

Working group participants also felt the Trust should advocate Town policy changes to promote affordable housing (e.g., amendments to the Inclusionary Zoning bylaw) and provide active political support for multiple diverse housing initiatives to help address local housing needs beyond what the Trust will be able to directly support through financial/real property resource allocation. Also, the Trust should review affordable housing development proposals, including Comprehensive Permits, and provide recommendations to Town officials and members of the appropriate Town boards.

### **Trust's Relationship with Housing and Sheltering Committee**

The Trust and the HSC members identified many benefits to considering a merger of the two committees and generally felt that a merger would enable both groups to accomplish more. Working group participants pointed out that the two entities roles, while different, are compatible, not exclusive, and with the expanded membership and energy that such a merger could facilitate, the formation of subcommittees could be possible to help focus their efforts. Participants wanted to ensure that the goals of both separate entities were preserved should they be merged into one body. In particular, the one key focus of the Housing and Sheltering Committee is addressing homelessness issues – with regard to provision of both housing and services. While it is understood that Trust funds could not be allocated to support services, the funds could be allocated to create and preserve housing for individuals and families experiencing or at risk of homelessness.

Participants felt that, should the merger occur, it would be especially important to create subcommittees to help the Trust adequately focus efforts on accomplishing its various goals. Some participants suggested the possibility of expanding the number of members on the Trust to allow more vigorous subcommittees – perhaps with feeder/advisory membership.

---

## **2) Partner Discussion Exercise Part 2**

Work on Things that Matter

### **EXERCISE INSTRUCTIONS**

Work with your partner(s) to discuss and record responses to the following question. This begins as a brainstorming exercise –so, write down everything that comes to the minds of you and your partner(s) –and then asks you to weigh options and prioritize. However, there is no need for agreement.

- a) What should the trust to work on in the next 5 years? Brainstorm ideas and indicate potential opportunities and/or barriers to working on each initiative.

### **SUMMARY OF DISCUSSION**

In addition to the critical efforts needed to secure revenue and real property, as discussed in some detail above, the working group participants generated the nine initiative ideas to consider

implementing in the next five years. The nine ideas, not listed in any particular order, were as follows:

- a) Coordinating role among housing groups
- b) Initiate development of affordable housing units
- c) Review/recommend affordable housing development proposals and promote neighborhood-scale housing projects
- d) Advocate to strengthen the Inclusionary Zoning bylaw
- e) Develop a concrete capital program and goals/ have multiple projects planned and have broad network of entities ready to develop
- f) Create transitional housing and permanently supportive housing (enhanced SROs)
- g) Homeownership programs, such as down payment assistance
- h) Rent subsidies
- i) Homeownership development

As part of the discussion exercise, participants considered and listed opportunities and barriers to implementing each initiative idea.

---

### 3) Prioritization Exercise

Priority Initiatives

#### EXERCISE INSTRUCTIONS

Write your responses to the following two questions on the post-it notes provided. Use a separate post it not for each initiative.

What do you think would be the best initiative(s) to work on in the shorter term (1-3 years)?

What do you think would be the best initiatives to work on longer term (3-5 years)?

#### SUMMARY OF DISCUSSION

Utilizing the list of nine potential initiatives generated in Exercise #2, described above, participants identified their individual priority initiatives, both shorter term (1-3 years) and longer term (3-5 years). Three priorities emerged from this exercises.

- a) Coordinating role among housing groups – five participants identified this initiative as a short-term priority and one participant as a long-term priority.
- b) Support creation of transitional and permanently supportive housing (enhances SROs) – three participants identified this initiative as a short-term priority and five as a long-term priority.
- c) Review/recommend affordable housing development proposals and promote neighborhood-scale housing projects – three participants identified this initiative as a short-term priority.

**JM GOLDSON**

**community preservation + planning**

68 Harrison Ave, 6<sup>th</sup> Floor

Boston, MA

[www.jmgoldson.com](http://www.jmgoldson.com)

Jennifer M. Goldson, AICP, Founder

[jennifer@jmgoldson.com](mailto:jennifer@jmgoldson.com)

617-872-0958